

## Quick Reference: Preventing and Handling Duplicates

Scenario	Actions	Determine if the contact...	Next Steps
<b>CASE INVESTIGATOR:</b> <b>Preventing duplication before entering a contact</b>	<ol style="list-style-type: none"> <li>Search the “All Contacts” view by key pieces of information, such as last name, phone number, email, or mailing address.</li> <li>Open each result and check for matching info.</li> </ol>	...has an existing <b>active</b> monitoring event:	<b>ACTION:</b> Speak with the contact’s owner and update the existing monitoring event per p.1 of <a href="#">the Handling Multiple Exposures</a> Job Aid.
		...existing <b>inactive</b> monitoring event:	<b>ACTION:</b> Proceed with cloning this event per p. 2 of the <a href="#">Handling Multiple Exposures Job Aid</a> ( <i>no re-activating required</i> ).
		...is a <b>new individual</b> who has never been monitored in the Tool:	<b>ACTION:</b> Create a new contact.
<b>CASE INVESTIGATOR:</b> <b>Duplicate warning while entering a contact</b>	<ol style="list-style-type: none"> <li>Right-click on each linked entry and select “Open link in new tab.”</li> <li>Review each profile.</li> </ol>	...has an existing <b>active</b> monitoring event:	<b>ACTION:</b> DO NOT SAVE. Speak with the contact’s owner and update the existing monitoring event per p.1 of <a href="#">the Handling Multiple Exposures</a> Job Aid.
		...existing <b>inactive</b> monitoring event:	<b>ACTION:</b> DO NOT SAVE. Proceed with cloning this event per p. 2 of the <a href="#">Handling Multiple Exposures Job Aid</a> ( <i>no re-activating required</i> ).
		...is a <b>new individual</b> who has never been monitored in the Tool:	<b>ACTION:</b> Click “Ignore and Save.”
<b>CONTACT TRACER:</b> <b>Duplicate warning on existing contact</b>	<ol style="list-style-type: none"> <li>Right-click on each linked entry and select “Open link in new tab.”</li> <li>Review each profile.</li> </ol>	...is a <b>duplicate of an existing contact who is currently being monitored:</b>	<b>ACTION:</b> Proceed to the process on page 2 of the <a href="#">Handling Duplicates Job Aid</a> .
		...is a previously-monitored contact with a <b>deactivated profile under a different C#:</b>	<b>ACTION:</b> Connect the contact profiles per the process in the <a href="#">Connecting Contacts Job Aid</a> .
		...is not a duplicate and is a <b>new individual</b> who has never been monitored before in the Tool:	<b>ACTION:</b> Continue with monitoring this individual.

***Remember that you should never deactivate or delete another user’s contact unless explicitly instructed to do so.***